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ABSTRACT

A Desegregation Commission's monitoring strategy is described. It addresses the goal of gathering and evaluating information in order to assure the constitutionally guaranteed educational equity in the Chicago (Illinois) Public Schools under that system's desegregation plan. The monitoring strategy would focus on the following five areas: (1) fiscal equity in allocation and expenditure patterns across categories of schools designated in the desegregation plan; (2) experiences and consequences of implementing a voluntary transfer policy; (3) perceptions and expectations of critical actors in the local school action system; (4) monthly and quarterly reviews of core monitoring indicators; and (5) test data and achievement scores by minority status. The strategy will also include consultation with relevant Board of Education staff. The Monitoring Commission will prepare a series of reports for members of the Board of Education. The system superintendent, and the general public. The following main sections of the paper describe the Commission's plan: (1) areas of inquiry; (2) design and data sources; (3) anticipated products; (4) a tentative work plan; (5) a supplementary budget for the first year; and (6) a projected budget for the second year of operation. (JB)

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Prepared for

The Monitoring Commission for Desegregation Implementation

Leon D. Finney, Jr., Chairman

A Strategy for Monitoring Desegregation Implementation in the Chicago Public Schools*

(Fiscal Years 1983 - 1986)

Prepared by

Mary Davidson, Ph.D.

May, 1983

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The Monitoring Commission for Desegregation Implementation
Lauren E. Allen, Director

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General Superintendent of Schools

*Approved in principle by the Monitoring Commission, May 3, 1983

SUMMARY

This monitoring strategy is designed to gather and evaluate information in order to assure constitutionally guaranteed educational equity for all Chicago school children. A five-part monitoring strategy addresses this goal through analyses aimed at verification and discovery in the following areas of implementation of Chicago's desegregation plan:

1. Fiscal equity in allocation and expenditure patterns across categories of schools designated in the plan (see p. 3);

2. The experience and consequences of implementing the voluntary transfer policy (see p. 4);

3. The perceptions and expectations of critical actors in the local school action system (see pp. 5-6);

4. Monthly and quarterly reviews of core monitoring indicators (see pp. 7-8);

5. Test data and achievement scores by minority status and across categories of schools designated in the plan.*

The development and refinement of study designs will include consultation with relevant Board of Education staff. Data collection and analysis to be carried out by Commission staff and consultants are dependent upon access to secondary data compiled by Board staff and upon direct access to the school system for the collection of primary data. The latter is of particular importance in order to accomplish field studies of local school action systems.

A series of reports will be prepared for forwarding by the Commission Chairman to the General Superintendent, members of the Board, and the general public.

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*Item 5 above, added upon recommendation of the ad hoc planning subcommittee, is not yet reflected in a separate narrative discussion, the work plan, nor the budget. As a separate focus, Item 5 will receive more in-depth analysis than was anticipated in Monitoring Indicators (see p. 7).

Success of this monitoring strategy is based on three assumptions:

1. Board cooperation through access to or provision of secondary data (see II-B, p. 8);

2. Board cooperation in obtaining access (i.e., entry and legitimacy) to carry out primary data collection and verification efforts in local schools; and

3. Board provision of adequate financial resources to initiate and sustain this effort (see V. and VI.)

The remainder of this document is devoted to a detailed elaboration of the following major topics:

I. Areas of Inquiry

II. Design and Data Sources

III. Anticipated Products

IV. Tentative Work Plan*

V. Supplementary Budget, 1982-83

VI. Projected Budget, 1983-84

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*Please see revised budget justification and work plan dated July, 1983. The products and workplan contained in this document were developed contingent upon approval of a $29,000 supplementary budget request which was not received.

I. AREAS OF INQUIRY

A. Fiscal Equity Analysis

1. Are financial resources equitably distributed across the various categories of schools as defined by the Board in its Desegregation Plan?

2. Do the racially identifiable schools enjoy disproportionate fiscal allocations?

3. Are the racially identifiable schools receiving needed funds to support quality education programming?

To answer these questions requires an analysis of the Action Plans submitted by school principals, allocational criteria, level of appropriations, and the timing and amount of these awards to each school as well as general fund awards. An analysis of desegregation dollars requires, at a minimum, a determination of expenditures made under the rubric of desegregation. This includes funds such as State Title I, as well as funds that would not have been spent were it not for desegregation implementation.

(According to the Consent Decree, the Board is required to provide or seek the necessary financial resources to support quality educational programs and compensatory programs for the majority of Chicago school children remaining in segregated schools.)

Determining equity in allocational and expenditure levels requires an understanding of the level of funding--in each school. Other questions that need to be answered include: How is the money being used? To fund which programs? Where? What do the financial data reveal about differences in allocation of fiscal resources for curricula and personnel in local schools, by districts, and across the system? Are there patterns of financial disparity between newly desegregated and racially identifiable schools?

Analysis of expenditure patterns will also indicate variations among magnet schools, other schools involved in voluntary transfers, as well as place emphasis on discovering the financial investment in programs intended to upgrade educational offerings in the racially isolated schools, target schools and community academies. This will include the monitoring of the criteria being considered by Board staff to assure provision of the Plan's requirements for the "Other Educational Components."

B. Transfer Experience Analysis

1. What is the pattern of voluntary transfers?
2. To what extent have Board policies and initiatives undertaken by Board staff contributed to stable integration/desegregation or resegregation between schools and within schools?

This requires analysis of "in and out migration patterns" by race and ethnicity and the impact of transfers on both sending and receiving schools. It necessitates consideration of the extent to which appropriate administrative controls are developed to assure that all transfers "enhance" desegregation. It also means identifying the extent to which children and their parents who want to transfer get an opportunity to know they can do so.

Equally important, the analysis will consider the program and classroom placements of transferring students. For example, how, if at all, do permissive transfers affect the likelihood of children being placed in certain special programs in the receiving school or in special remedial classrooms? And, in contrast, what happens to white children in formerly predominantly black schools.

The racial and ethnic balance of each school identified in the plan, as reflected by enrollment data, will be examined to determine constitutional compliance as defined by the Plan. Particular attention will

be directed at identifying and tracking those schools vulnerable to constitutional slippage, i.e., 65-70% white. Throughout, the analysis will focus on identifying disparities in the transfer experience of white vs. minority children. Close attention will be paid to the phenomenon of white children transferring to schools that are already predominantly white. Similarly, transfer failures among black children, i.e., black children who have transferred but have subsequently dropped out of the voluntary or permissive transfer programs, also will be analyzed. Further, a determination of the pattern, experience and effect of student transfers among the target schools, community academies and the racially identifiable schools will not be neglected. Finally, the analytic design must take into consideration the impact of school closings.

C. Local School Action System Analysis

1. To what extent do perceptions and expectations about implementation of the desegregation plan reflect agreement or disagreement among the different constituencies in the local school action system?

2. Are students, parents, staff, administrators, community leaders and other critical actors in greater agreement as to expectations for desegregation in racially identifiable schools as compared to those in other types of schools?

3. Are there differences in levels of agreement across the different categories of schools described in the Plan?

4. To what extent are Board policies and program initiatives perceived as contributing to or detracting from desegregation implementation?

To accomplish these objectives, field studies will be carried out in five to eight Chicago neighborhoods to determine local school action system expectations for student achievement and for implementation of the desegregation plan. This will involve group and individual meetings with a sample of parents, students, teachers, community leaders and other critical actors. Here, as in the other areas of inquiry, the analyses will center on comparative analysis of white and minority children in terms of test scores and achievement, as participants in extracurricular activities, attendance, and other indicators of desegregation implementation.

The local school action system analysis will not only focus on perceptions, expectations, and achievement, but also on the level and quality of interaction of different constitutencies in the system. It will consider, for example, parent involvement in the local schools. Special attention will be paid to understanding the experience of students and parents when the children are transferees, are placed in bilingual progarms or are in special education classrooms. The analysis also will consider the perceptions of teachers and administrators and the extent to which there has been equitable assignment and promotion of minority faculty and administrative staff.

This component of the monitoring strategy--more than all others--provides for exploration of the human experience in the monitoring of a school system undergoing "desegregation," i.e.g, a voluntary student assignment plan and a requirement to assure quality educational programs for the majority of Chicago public school children attending racially identifiable schools.

D. Analysis of Monitoring Indicators

The Commission will carry our periodic analyses on a monthly, quarterly, or other appropriate time basis, of various data sets

maintained by the Board of Education. Such analyses will be aimed at identifying trands and disparities of selected variables between white and minority students across the various categories of schools described in the Plan.

These variables include, but are not limited to the following types of data:

1. Enrollment patterns, attendance patterns, and stability of enrollment rates
2. Placement and exit rates in bilingual programs and special education classrooms
3. Dropouts, non-promotions and graduates
4. Test data and achievement scores
5. Student discipline, suspensions
6. Safety, security and transportation
7. Special transfers
8. School closing plans and boundary changes
9. Staff development
10. Faculty assignment
11. Teacher and student time on task
12. Racial/ethnic incidents
13. Student self-concept
14. Teacher expectations for pupil achievement
15. Administrative expectations for pupil achievement
16. Administrative expectations for teacher performance

Some of the above categories of information will be included in the transfer experience analysis as well as in the design of the local school action system field study.

II. DESIGN AND DATA SOURCES

A. Process of Design Development

A number of specialists from a cross-section of disciplines including Board of Education staff will be asked to participate in a 1-1/2 day working meeting. This meeting will provide an opportunity for the Lead Consultant to initiate group discussion with other experts from specialized areas including and tangential to the areas of urban public education and school desegregation.

An outcome of the meeting will be the identification by the Lead Consultant of specialists who will be requested to contribute on an ad hoc consultant basis to the monitoring project by developing and reacting to designs, instruments and data analysis strategies. For example, a sampling statistician will be engaged to advise in the selection of schools, students and other sample units for the various monitoring analyses to be undertaken.

B. Data Sources

Secondary Data. In order to avoid duplication of effort, the Commission needs an understanding of the data base presently maintained by the Board. This requires close collaboration between the Lead Consultant and the Board's research, evaluation, and data processing staff. It requires access to the Master Data Dictionary, briefing on the pupil tracking system (if any), and access to other code books that define how and where data are stored.

The Commission's Lead Consultant must have authorization from the General Superintendent to access individual pupil data on achievement, attendance and fincial data. This might require analysis of on-line data, requests for data tapes, or detailed specifications for programs needed to produce various data print-outs.

The Commission also will examine materials prepared by Board of Education staff, reports prepared for the Court, the General Superintendent, and for the Committee on Student Desegregation of the Board of Education.

Primary Data. Field data collection is needed in support of each area of inquiry. Commission members, staff and consultants, supplemented by trained field interviewers, need to be involved in the collection of primary data and the selective verification of secondary data.

III. ANTICIPATED PRODUCTS

Time Frame: May 1-August 31, 1983

A. Fiscal Equity Analysis:

1. Sample of principals and administrative staff to be interviewed
2. Interview schedule and pilot test
3. Preliminary design and data analysis format

B. Transfer Experience Analysis:

1. Design and data analysis format for October, 1983 enrollment data analysis
2. Preliminary design for sample selection and data analysis of transfer experience

C. Local School Action Systems Analysis:

1. Rationale for selection of neighborhoods and schools

D. Monitoring Indicator Analysis:

1. Documentation of data needs and resources
2. Identification and listing of key board staff for coordination and notification of trands or disparities in the core monitoring indicators
3. Schedule for over-time monitoring of selected indicators and for phasing-in of remaining indicators

III. ANTICIPATED PRODUCTS

Time Frame: Beginning September 1, 1983

A. Fiscal Equity Analysis:

1. Annual Reports on:
   --allocational criteria
   --allocational levels and expenditure levels
   --action plans and implementation of those plans

(beginning November, 1983)

B. Transfer Experience Analysis:

1. Annual Reports on:
   --school-by-school analysis for constitutional compliance
   --the experience of the transfer process in the receiving schools from the perspective of parents and students who have transferred
   --the effects of transfers on the sending schools
   --the impact of transfers occurring among the racially identifiable schools

(beginning January, 1984)

C. Local School Action System Analysis:

The planning of five to eight case studies that illuminate the process and perception of desegregation implementation in local schools from the perspective of students and others in the neighborhood action system
(beginning December, 1984)

D. Monitoring Indicator Analysis:

1. Special Reports as needed
2. Bilingual Newsletter (quarterly), including editorial by Commission Chairman, contributions by students, parents; documentation

of desegregation successes; Issue analyses by community groups; Comments by Commission Members

3. Internal System Notification developed

E. Interim and Final Monitoring Reports:

1. Annual summary overview and analysis of the Chicago School Desegregation Experience

(It is estimated that a final report will be completed within six months after Federal Court release.)

IV. TENTATIVE WORK PLAN

Time Frame - May 1 through June 30, 1983	Target Date
-Lead Consultant Planning/Coordinating Meeting	June, 1983
-Identification of Monitoring Component Staff	May 1 to June 15, 1983
-Hiring of Monitoring Component and Support Staff	June 1, ongoing
-Orientation of Staff	Ongoing
-Development of Working Procedures and Liaison Assignments to Board Departments, Offices and Bureaus	June 1, 1983
-Administrative Support, Acquisition of Space, Equipment, Supplies, etc.	Ongoing
-Continue School-by-School Analysis of Financial Data (appropriations)	Ongoing
-Continue School Site Visitations	Ongoing

Time Frame - July 1 through August 31, 1983

A. Fiscal Equity Analysis

-Continue school-by-school analysis of financial data

-Development instruments and select sample for principal and other administrative staff interviews

-Secure action plans for all schools receiving supplementary State Title I and OEEO dollars in 1982-83. Plan 1983-83 follow-up

-Begin analysis of 1982-83 school action plans

-Establish design for allocation/expenditure comparative analysis for 1982-83 dollars and future year analyses

-Coordinate with Department of Justice and with outside consultants as well as special interest community groups re: fiscal equity analysis

B. Transfer Experience Analysis

-Planning and design development in preparation for analysis of October enrollment data

-Specification of data needs to support magnet school and other student transfer options data analysis

-Planning and design development including sample selection for study of the transfer experience

-Planning and design development including sample selection for impact study of transfers on receiving schools and sending schools

C. Local School Action System Analysis

-Pre-planning for selection of neighborhoods and schools

-School site visitation

-Enlist cooperation of staff

-Pre-planning and begin design and instrument development

D. Monitoring Indicator Analysis

-Identify and develop resources to carry out data analysis of existing data bases and CBE system files including Master Dictionary

-Identification of timelines of reporting, instruments used

-Examination and discussion of validity and reliability issues re: raw data input documents being computerized

-Contingent on liaison relationship, begin training for on-line data analysis by Commission staff

-Begin preparation for newsletter, develop distribution list, plan reproduction and dissemination by Commission staff

-Design mechanisms for notifying OEEO and other appropriate units of the Board of Education of trends or disparities in the core monitoring indicators